



FY20 Performance Management Cycle Timeline

The following timeline is a full performance management cycle timeline for all Montgomery County employees excluding *MLS, PLS and GSS*. The Performance Management Timeline is a guide to ensure creation, review, approval and finalization of FY20 performance plans, evaluations and appraisals are completed timely and accurately for all County employees.

	Completed	Deadline	Action	Role
Phase 1: PLAN	<input type="checkbox"/>	Jul 1, 2019	OHR open performance plans in Oracle WPM	OHR WPM Plan Administrator
	<input type="checkbox"/>	Jul 1, 2019	Begin the creation of employees' performance plans for the fiscal year: <i>goals, objectives and development plans</i>	Supervisor Employee
	<input type="checkbox"/>	Aug 13, 2019	Confirm and establish employee performance plans: <ul style="list-style-type: none">Non-Bargaining Unit (NBU) employees' plans in Oracle WPM and/or;Paper Performance Planning and Evaluation (PPE) forms for Bargaining Unit (BU) employees	Supervisor
	<input type="checkbox"/>	No later than 10 days after plan is established	Provide employee with a copy of the signed performance plan	Supervisor
	<input type="checkbox"/>	Aug 14, 2019	<ul style="list-style-type: none">Generate Performance Plans and Appraisal Status Monitor ReportsEnsure employee WPM performance plans and paper PPE forms are created	HR Liaison
	<input type="checkbox"/>	Ongoing	<ul style="list-style-type: none">Provide and/or solicit feedback from your supervisor on your performanceDiscuss training and career development opportunities with your supervisor	Employee
			Conduct frequent performance coaching sessions throughout the year with your employees	Supervisor
Phase 2: DEVELOP	<input type="checkbox"/>	Jan 31, 2020	Schedule, conduct and document mid-year progress discussions with employees	Supervisor
			Document, sign and date mid-year progress discussion forms (electronic appraisals are date-stamped when routed)	Employee
	<input type="checkbox"/>	Ongoing	<ul style="list-style-type: none">Provide and/or solicit feedback from your supervisor on your performanceDiscuss training and career development opportunities with your supervisor	Employee
			Conduct frequent performance coaching sessions throughout the year with your employees	Supervisor
Phase 3: EVALUATE	<input type="checkbox"/>	June 1, 2020	Document and provide performance accomplishments to your supervisor on your online appraisal or paper PPE form	Employee
	<input type="checkbox"/>	*July 8, 2020	<ul style="list-style-type: none">Enter performance appraisal ratings and comments online (WPM) and paper (PPE)Employee enters final overall rating comments (<i>optional</i>) in Oracle WPM or paper PPE formShare and gain final approval from Reviewing Official	Supervisor Employee Reviewing Official
	<input type="checkbox"/>	**July 31, 2020	Finalize (with signature and/or electronic date stamp) all performance evaluations.	Supervisor Employee Reviewing Official
	<input type="checkbox"/>	***August 1, 2020	<ul style="list-style-type: none">Generate Performance Planning and Appraisal Status Monitor reportsEnsure all employee evaluations are completed in WPM and on paper PPE formsSubmit paper PPE forms to Core HR/Records Management EOB 12th Floor	HR Liaison

NOTES:

- *Supervisors must send online performance evaluations to employee for final overall rating comments **before** sending evaluations electronically to Reviewing Officials for approval
- **Performance plans/evaluations are completed when the Reviewing Official finalizes in the system or signs the paper performance evaluation forms
- ***Supervisors must provide HR Liaisons with hard copies of the finalized appraisals for both the employee and the supervisor

WPM Tools and Resources

Visit **Performance Management Resources** and **WPM System Training Materials** for available online resources including policies and procedures, forms and guidelines

Questions

Your department HR Liaison is your first point of contact for performance management questions
If you have additional questions, please contact the Performance Management team at **Performance.Matters@montgomerycountymd.gov**